



M3 Training Inventory Module

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The M3 Inventory Module allows you to conduct a full or partial inventory on your library's holdings. A full inventory would involve your entire collection at one time; a partial inventory allows you to inventory a portion of your collection at any time. Circulation can continue while going through the process.

Prior to running an Inventory:

1. Run any statistical reports you need for year-end (suggested reports attached).
2. Delete items that have been missing for awhile. Print a list of your deleted records; send a copy to SLS for updating Union. Then purge all deleted records (bib and holding). If you don't, Inventory will look for them and report them out on the missing list. Note: You will lose all statistical information associated with those records purged.
3. Buy new batteries for your portable scanner. Change the AA batteries every year before beginning inventory; change the lithium battery every other year (you need to unscrew the back of the scanner).

Part 1: Conducting a Full Inventory

There are basically four steps in the Inventory process:

1. Scan barcodes with portable scanner
2. Upload barcodes from scanner (or key or wand directly into Inventory Module)
3. Process Inventory to obtain reports.
4. Mark Items Missing and/or Remove Missing Message from Newly Found Items

1. Barcode Scanning with Portable Scanner

A. Plug the portable wand into the opening on the tricolor box marked *wand* or *scanner*

B. **Turn on:** On older/larger units, switch is on the side; on the smaller/newer units, there is a green on/off button on the top left of the key pad.

C. **If** the tricolor screen comes up with a message like "TRICODER W8163 HIT ANY KEY"
**Hit Any Key*

D. **If** the screen says "NON-PORTABLE MODE"
**Press F1*

E. At "DATA COLLECTION"
**Press Yes (Enter Key)*

F. At "PROGRAM NO.?"
**Press 0 (zero)*

G. At "ENTER DATA"
**Begin scanning barcodes. You may also type in a barcode if you have trouble scanning.
The Shift key toggles between letters and numbers on the key pad.*

Tip: You will need to scan all of the barcodes on your shelves as well as any other barcodes you may have assigned to periodicals, videos, or items that are permanently stored in a classroom. We suggest that you do not scan your entire collection at once--just in case something goes wrong with the upload. Maybe scan one section of shelves or do all of your 100's and then upload before continuing. You can find out how full the memory is on the portable scanner by pressing the "STATUS" key. The date, time and number of bytes FREE will appear. If you get down to about 10K free, you should upload your barcodes. Press the F1 key to return to barcode entry.

2. Upload Barcodes to Mandarin from Portable Scanner

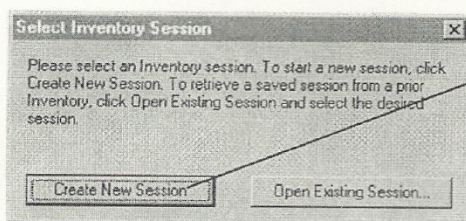
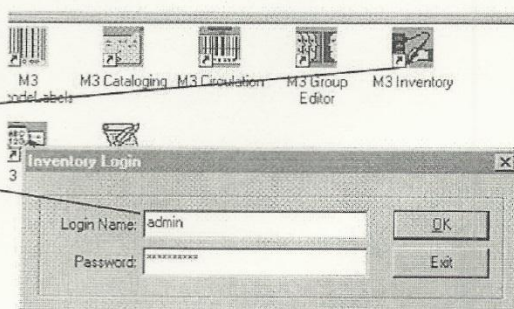
A. Hook up the Inventory Y-cable to your workstation. The cable needs to be inserted between your keyboard cable and the cable that connects your keyboard and desk scanner to your computer. The easiest way to do this is to start with your keyboard---follow the keyboard chord to where it is connected to another cable. Detach this connection--the Y-cable should be inserted here: one end attaching to the keyboard cable and the other end to the cable that eventually goes into the back of your computer. SLS staff can help you with the cable hook-up if you have trouble!

Plug the end of the portable Y-cable (the end that looks like a phone plug) into the portable scanner in the opening marked "Computer" on the newer/smaller units or into the opening on the bottom of the older/bigger units. Make certain your portable scanner remains on, otherwise your keyboard may not work. The scanner may go into a "sleep" mode if you walk away and leave it for awhile; just turn it back on.

B. Begin Upload:

Step 1:

To access the Inventory Module, **double click on the M3 Inventory icon** in your M3 folder. You will be prompted to **enter your login name and password**. Only users with the correct permissions to the Inventory Module will have access.

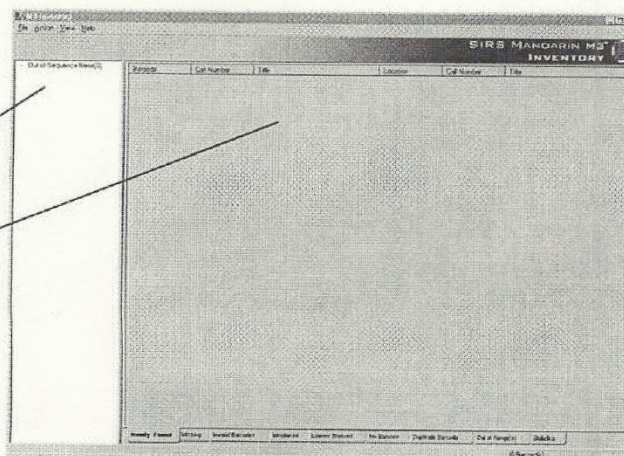


Step 2:

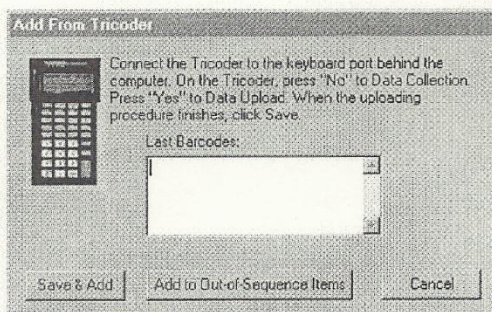
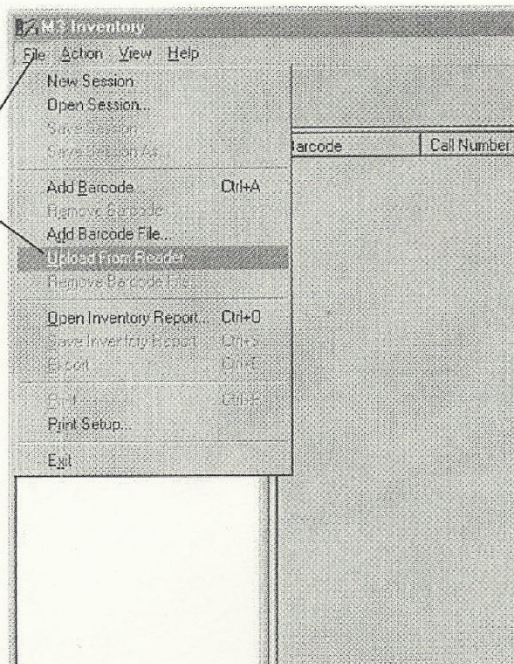
You will see a window like the one at left. You can **choose to start a new session if you are just beginning Inventory**. Once you have started Inventory, each time you re-enter the Inventory Module, you will want to open an existing session.

Think of a "session" as your Inventory running from start to finish----it will include all of your uploads for this year's inventory.

The Inventory Window will open. The narrow pane to the left of the screen is the **barcode pane**--this is where the uploaded barcode files will be listed. The larger pane to the right will list the **various reports** generated from Inventory.



Step 3:
Click on the File Menu and choose
"Upload from Reader" to upload your
barcodes from the portable scanner.



Step 4:

Once you choose "Upload from Reader," a window like the
one at left will appear. **Look at the portable scanner:**

If the screen is at "ENTER DATA"

***Press F1**

If the screen says "NON-PORTABLE MODE"

***Press F1**

If the screen says "DATA COLLECTION"

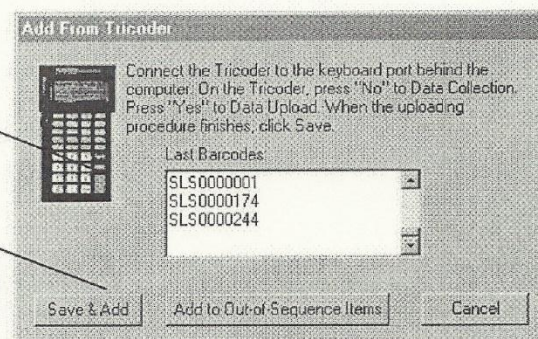
***Press No**

At "DATA UPLOAD"

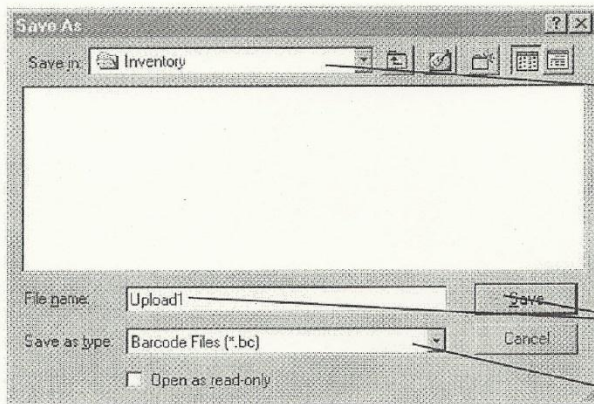
***Press Yes**

Step 5:

The barcodes will scroll up through the
screen. Once the upload is finished,
click Save & Add.



*Note: At this point, your tricoder will be displaying a
message asking you if you want to delete your barcode
file---DO NOT DO ANYTHING yet, until you complete
the next step of saving your barcode file to your
inventory session---just leave your tricoder where it is
until you finish saving the file.*

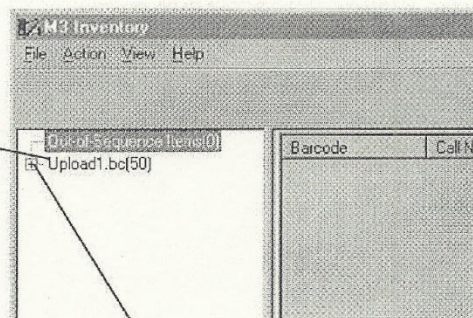


Step 6:

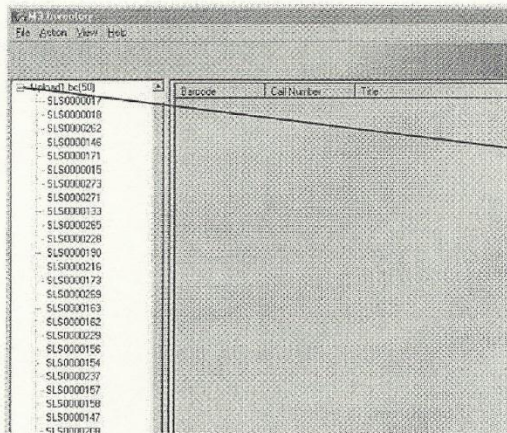
The File Save window will open. Notice what directory you are saving in. You can save files wherever you want---just make sure you are saving all files in the same place and that you remember where they are!! M3 has an Inventory folder in its directory if you want to save the files there---the path to this folder is: C:\Program Files\Mandarin M3\Inventory.

Type a filename in the box and click Save. Also note that your barcode file is saved as a .bc file type.

Once saved, you will be returned to the Inventory Module screen. **Your new barcode file will now be listed in the barcode pane.** The number of barcodes in the file will be in parenthesis to the right of the filename.

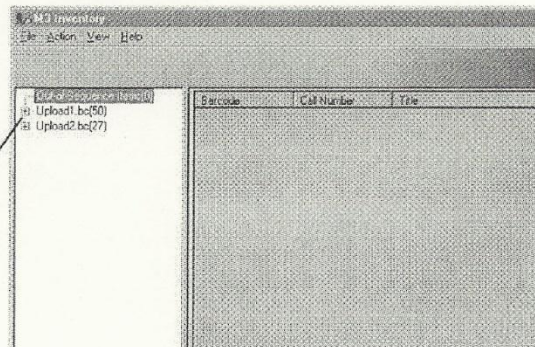


If you click on the + sign next to the barcode file, the file will open to display all the barcodes contained in it. Click the -sign next to the file to close it again.

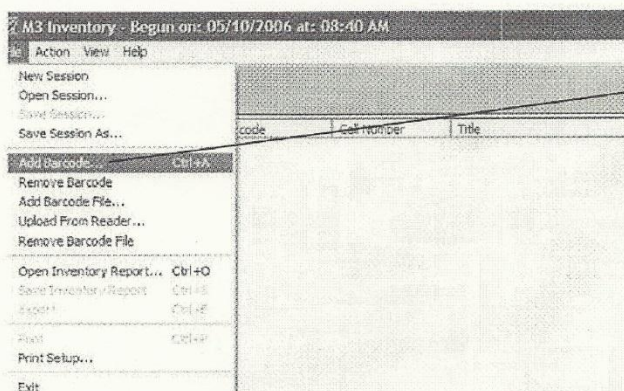


Continue scanning and uploading barcodes in the same manner until you have completed your scanning. Make sure you name each upload something different during the Save Step (top of page). As you upload more barcode files, they will add to the list in the barcode pane.

***Once you have successfully saved your barcode file to your inventory session, it is OK to go ahead and delete the file from your tricoder. **Press the green Enter/Yes key to delete the file; it will ask you if you are sure---press yes again.** The tricoder will now be clear and ready for your next round of scanning.



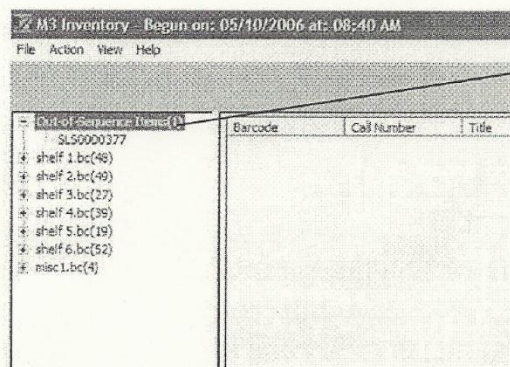
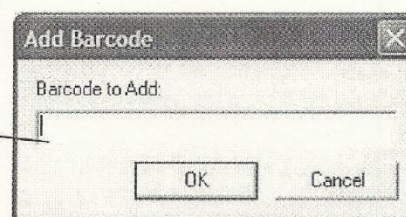
Inputting "Random" Barcodes for Inventory



Option 1:

The **Add Barcode** choice under the File menu allows you to type in one barcode at a time to add to your current Inventory session; this could be useful for those books just returned in Circ. or for other random books off the shelf that you want to enter into Inventory.

A box will appear---*type or scan in the barcode to be added to Inventory* and click OK.

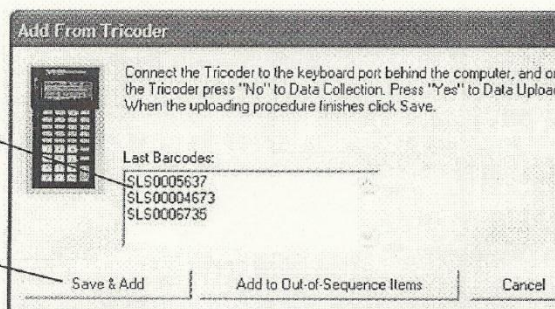


Barcodes entered with this method will automatically be placed in the **"Out-of-Sequence"** folder in the left column. Barcodes in this group will be inventoried like any other.

There is a drawback to using this method of input: you are not able to save these barcode files as you do with the "Upload from Reader" option (see below). Saving the barcode files is a form of "backing up" your work---in the event you lost your Inventory Session, you would still have your barcode files saved separately, so you would not have to rescan. Out of Sequence Items would be lost if an Inventory Session is lost.

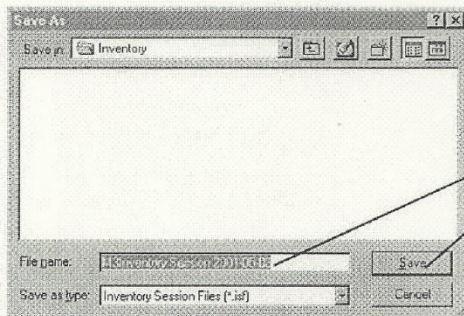
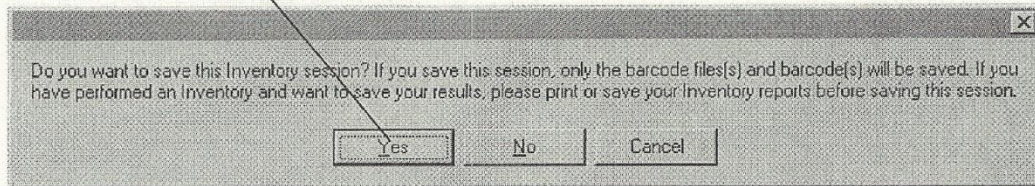
Option 2:

The "Upload From Reader" choice can also be used for those random barcodes---such as circulation returns---without using the tricolor. When you click on Upload From Reader, *you can use your circulation scanner to scan barcodes into this screen, or you can also type barcodes one at a time, hitting Enter after each one.* This method allows you to enter more than one barcode at a time, and also allows you to proceed with the Save & Add step, so that you can backup your work by saving these barcodes as a separate file---unlike in Option 1 above. These barcode files will be added to the left column, just like the files you have uploaded from your tricolor.



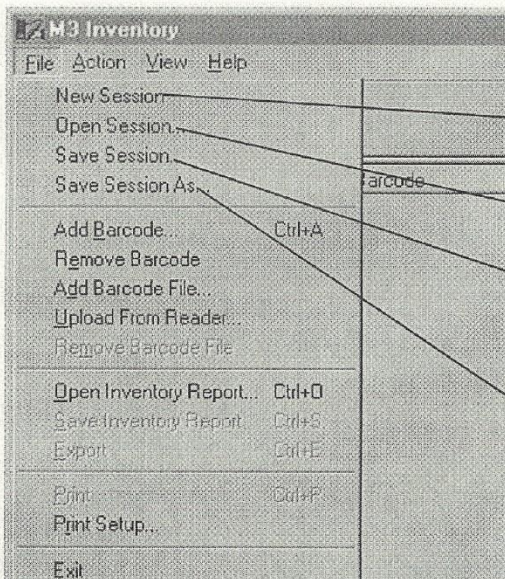
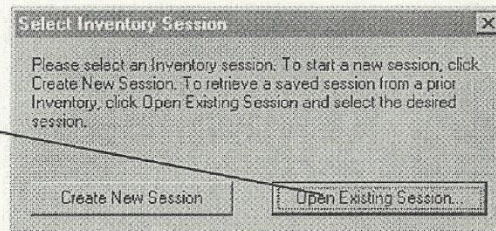
C. Closing and Re-Opening the Inventory Module

If you have begun an Inventory session and close the Inventory Module (by clicking the X in the top right corner of the screen or by clicking on File, Exit), you will be prompted to save your session with the message below. **Click Yes to save your session for later access.** This will save your session with all barcode files that have been entered into Inventory.



When you click Yes, the File Save window will open. **Type in a name for your Inventory session and click Save.** Make sure you are saving your Inventory Session in the same location where you have saved all of your barcode files.

The next time you open the Inventory Module, you will need to **click on Open Existing Session** to retrieve the Inventory session you were working on.



There are also options on the File Menu for creating, saving and accessing Inventory Sessions:

New Session: Creates a blank Inventory Session, with no barcode files loaded in; basically like starting inventory over.

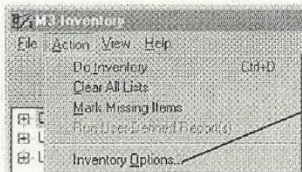
Open Session: Opens an existing Inventory Session.

Save Session: Save the Inventory Session that is currently open. If you have the Inventory module open all day, I would suggest you click this periodically to save your work.

Save Session As: Save your current session under a different name.----be careful of doing this; you would end up with multiple sessions saved, which might cause confusion. If all is going well with your inventory session, you shouldn't really have a reason to use this.

3. Setting Inventory Options Screen

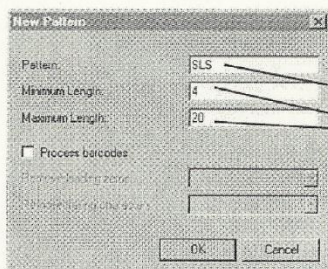
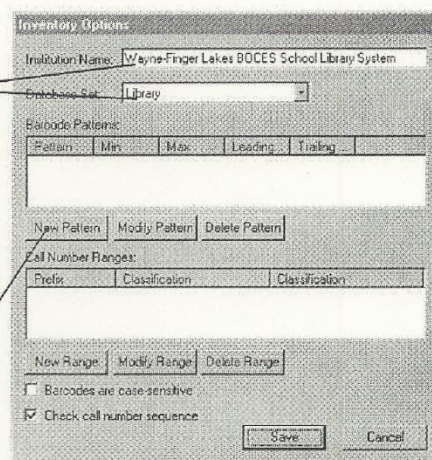
The Inventory Options screen contains a few settings that give specifics on how Inventory should evaluate your collection. You do not need to have this screen set up before you begin uploading barcodes into Inventory, however you will want to review the settings on this screen before you move on to the Processing step.



To reach the Options screen, click on the Action menu at the top of the Inventory screen and **click "Inventory Options."**

The Inventory Options screen allows you to specify information such as your Institution Name (to appear on your statistics report), and the Database you are conducting Inventory on (i.e. Library vs. Equip).

You may also want to set **Barcode Patterns** for Inventory to evaluate. For instance, if all of your barcodes begin with the same 3 letters, you can specify that pattern here. When you upload barcodes into Inventory, any barcodes that don't match your pattern will be bolded in the barcode list in the left column of the Inventory screen. However, there is no report in Inventory that will list all barcodes that do not match your pattern (so I don't really think this option is all that necessary!). **Click on New Pattern to set a pattern.**



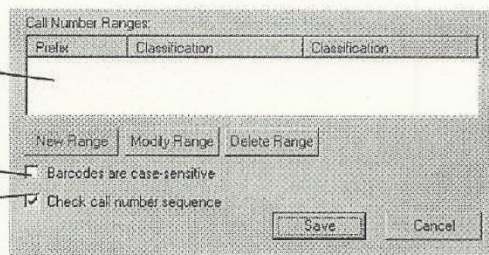
When setting a new barcode pattern, type in the characters that your barcodes have in common. Then indicate the minimum and maximum lengths a barcode could be.

Click OK when done. You can add multiple patterns if you have more than one in your library.

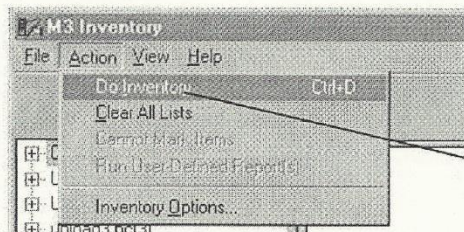
"Call Number Ranges" is used when conducting a partial inventory (see Page 11 of these instructions).

Check **"Barcodes are case-sensitive"** if you want Inventory to evaluate the case of each barcode entered.

Check **"Check call number sequence"** if you want Inventory to tell you what items appear to be out of shelf order.



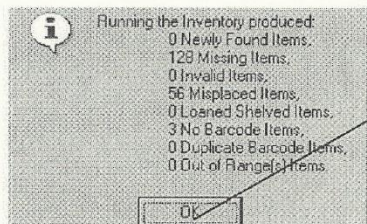
4. Processing Inventory



When all barcodes have been uploaded into Inventory, you will need to run this Processing step so that M3 can compare the barcodes you've uploaded with those in your database. Once you process inventory, you will be able to view and print out a variety of reports. To process, **click on the Action menu and choose "Do Inventory."**

5. Inventory Results: Dealing with Reports

Once you process Inventory, reports will be available for you to view and print. If you close (and save) your Inventory session, the reports are not saved in the session. The next time you open the session, you will just need to process ("Do Inventory") again to get a set of "fresh" reports.

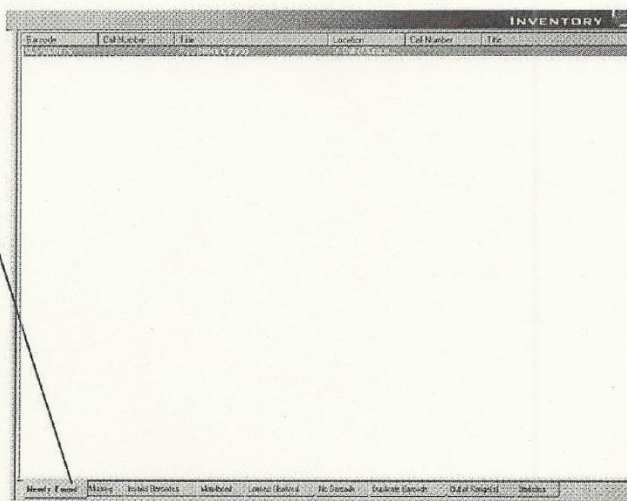


Inventory will only take a few seconds to process. When it is finished, you will see a box like the one at left showing the different counts it found. **Click OK to view your reports.**

The different Inventory Reports are labeled at the bottom of the Report Window. Click on a tab to view a report.

The Newly Found Report will list any barcodes that were missing from a previous inventory, but are now accounted for.

To Resolve: Print out the listing and go to the shelves to verify that the items are actually back in your library. If you determine that the items are no longer missing, you can globally "unmark" them (turn their status from Missing to Normal). While on the "Newly Found" Report page, click on the Action Menu and choose "Mark Newly Found" items.



Barcode	Call Number	Title	Author	Date
SL5000191	025.3 Wei	Learning, linking, critical thinking: information strategies for the K-12...	Wolburg, Hilda K.	today
SL5000197		Ready for reference	Zemich, Barbara B.	today
SL5000195		Intellectual freedom manual 2		today
SL5000190		How to talk so kids will listen & listen so kids will talk /	Faber, Adele	today
SL5000194		This way to books /	Bault, Lucinda Feltz	today
SL5000188		Information and bookkeeping	Ellerberg, Michael B.	today
SL5000193		Reaching out	Seidling, Barbara	today
SL5000192		Drama and blueprints		today
SL5000119		PostScript Catalog		today
SL5000158		Harcourt's school	San, Thomas R.	today
SL5000151		Harcourt's school	San, Thomas R.	today
SL5000125		Social studies through children's literature	Prosser, Anthony	today
SL5000124		The read-aloud handbook /	Tierney, Jin	today
SL5000136		The read-aloud handbook /	Levine, Jan	today
SL5000135		Flexible across library media progress /	Burkhardt, Jan	today
SL5000132	271.3 B11	Zap! In education /	Byrnes, William C.	today
SL5000128	327.9 Chu	Beyond flexible scheduling	Dubois, Nancy L.	today
SL5000127		Power Teaching: A Handbook of the School Library Media Specialist	Vandegrift, Kay E.	today
SL5000126	027.8 TUR	Helping teachers teach	Turner, Philip M.	today
SL5000125	371.5 HEL	Projects for new technologies in education	Peller, Norma	today
SL5000124	371.3 HEL	Projects for new technologies in education	Heller, Norma	today
SL5000123		Savage inequalities	Kozol, Jonathan	today
SL5000122	300.48 STO	Silicon snake oil	Stoll, Clifford	today
SL5000121	300.48 STO	Silicon snake oil	Stoll, Clifford	today
SL5000120	158.00V	The seven habits of highly effective people	Covey, Stephen R.	today
SL5000119	158.00V	The seven habits of highly effective people	Covey, Stephen R.	today
SL5000118	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000117	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000116	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000115	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000114	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000113	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000112	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000111	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000110	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000109	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000108	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000107	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000106	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000105	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000104	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000103	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000102	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000101	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000100	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000099	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000098	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000097	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000096	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000095	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000094	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000093	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000092	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000091	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000090	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000089	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000088	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000087	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000086	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000085	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000084	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000083	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000082	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000081	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000080	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000079	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000078	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000077	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000076	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000075	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000074	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000073	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000072	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000071	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000070	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000069	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000068	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000067	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000066	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000065	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000064	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000063	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000062	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000061	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000060	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000059	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000058	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000057	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000056	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000055	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000054	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000053	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000052	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000051	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000050	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000049	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000048	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000047	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000046	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000045	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000044	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000043	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000042	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000041	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000040	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000039	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000038	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000037	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000036	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000035	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000034	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000033	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000032	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000031	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000030	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000029	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000028	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000027	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000026	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000025	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000024	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000023	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000022	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000021	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000020	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000019	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000018	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000017	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000016	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000015	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000014	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000013	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000012	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000011	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000010	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000009	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000008	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000007	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000006	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000005	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000004	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000003	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000002	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today
SL5000001	372.373 B11	The basic school: a community for learning	Bowe, Ernest L.	today

The Missing Report will list all items that Inventory has determined are missing from your shelves. These will be barcodes that are in your database, but were not scanned into Inventory. This will not include any items that are loaned out at the time your Inventory is processed.

Items that are missing for the first time will appear in red and will say "Today" under the date column (today is the first day they've been noted as missing); items that have been previously marked missing will appear in black and may show a date that they were first marked missing.

Note: To print any of your Inventory Reports, click on the tab for the report you want to print. Then click on the File Menu and choose "Print [report name] List."

To Resolve: Click on the call number heading to sort this list by call number. Then print out and look around for items on the list:

- *Double check your shelves; maybe some were missed during scanning.
- *Copy the list and share it with your teachers so they can check their rooms for items.

Barcode	Call Number	Title
5150000127	5150000127	Learning, teaching, critical thinking: information strategies for the 21st
5150000175	5150000175	Ready for reference
5150000175	5150000175	Individual freedom manual /
5150000175	5150000175	How to talk to kids and teens & listen to kids and teens /
5150000175	5150000175	The way to books /
5150000175	5150000175	Information problem-solving
5150000175	5150000175	Researching
5150000175	5150000175	Brainstorming and brainstorming
5150000175	5150000175	Procedures & Catech
5150000175	5150000175	Harvard's school
5150000175	5150000175	Harvard's school
5150000175	5150000175	Secret studies through children's literature
5150000175	5150000175	The medieval handbook /
5150000175	5150000175	The medieval handbook /
5150000175	5150000175	Facilitate access library media programs /
5150000175	5150000175	Travel in education

If items are found, scan and upload them into Inventory. You can then re-process your inventory (page 7) to get a new report---any items you have scanned in should have fallen off of the report. Continue this process as many times as you wish.

When you are satisfied that items showing on the Missing list are really missing, you can globally mark all of the items with a Missing message in their records. Click on the Action menu and choose **"Mark Missing Items."** Each item will now have a 994a field added to its holding record with the word MISSING in it. This message will show in OPAC when the item is searched for. Also, if an item marked as missing is returned, Circulation will alert you with a message and will give you the option of returning the item to a normal status.

Barcode	Location	Call Number	Title
5150000145	5150000145	025.5	Teaching information literacy using electronic resources for grades 5-12

The **Invalid Barcodes Report** shows any barcodes that were scanned into Inventory that are not found in your database---essentially, there are items on your shelves that have not been cataloged in your database.

To Resolve: This report cannot tell you the title of the item (because there is no record for it in the database), but it does try to tell you where the item is on your shelves by identifying the item that was scanned after or before it--and by giving the call number information of that item. Inventory will not be able to give you any specific information on Out-Of-Sequence Items. Print out this list and take it to your shelves. Look for the title that is listed as before or after the "phantom" barcode---when you find that title, the item that needs to be cataloged should be near it. Pull the item and make a pile for cataloging later.

The **Misplaced Report** is designed to help you identify items that may be shelved incorrectly. For this report to be generated, you need to have selected **"Check Call Number Sequence"** on the Inventory Options Menu (see page 7). **This feature also only works correctly if you have scanned your collection in shelf order.** For each item that Inventory is calling Misplaced, it will also give you the location information for the item that was scanned before or after.

To Resolve: Print the list and locate the item that is listed as before or after the "misplaced" item. When you find that item, the misplaced item should be near it. Pull the item and reshelv in the correct location.

Barcode	Call Number	Title	Location	Call Number	Title
5150000127	5150000127	Learning, teaching, critical thinking: information strategies for the 21st	5150000127	5150000127	Learning, teaching, critical thinking: information strategies for the 21st
5150000175	5150000175	Ready for reference	5150000175	5150000175	Ready for reference
5150000175	5150000175	Individual freedom manual /	5150000175	5150000175	Individual freedom manual /
5150000175	5150000175	How to talk to kids and teens & listen to kids and teens /	5150000175	5150000175	How to talk to kids and teens & listen to kids and teens /
5150000175	5150000175	The way to books /	5150000175	5150000175	The way to books /
5150000175	5150000175	Information problem-solving	5150000175	5150000175	Information problem-solving
5150000175	5150000175	Researching	5150000175	5150000175	Researching
5150000175	5150000175	Brainstorming and brainstorming	5150000175	5150000175	Brainstorming and brainstorming
5150000175	5150000175	Procedures & Catech	5150000175	5150000175	Procedures & Catech
5150000175	5150000175	Harvard's school	5150000175	5150000175	Harvard's school
5150000175	5150000175	Harvard's school	5150000175	5150000175	Harvard's school
5150000175	5150000175	Secret studies through children's literature	5150000175	5150000175	Secret studies through children's literature
5150000175	5150000175	The medieval handbook /	5150000175	5150000175	The medieval handbook /
5150000175	5150000175	The medieval handbook /	5150000175	5150000175	The medieval handbook /
5150000175	5150000175	Facilitate access library media programs /	5150000175	5150000175	Facilitate access library media programs /
5150000175	5150000175	Travel in education	5150000175	5150000175	Travel in education

Note: To print any of your Inventory Reports, click on the tab for the report you want to print. Then click on the File Menu and choose **"Print [report name] List."**

Barcode	Cop Number	Type	Location	Call Number	Title
SLS0000195	REF 027.8 WAL		Into the Curriculum :	In Out of Sequence...	

Note: If you are continuing to circulate during Inventory, this is one report that could be inaccurate. If you scan a shelf of items for Inventory, and someone checks one of those items out before you process your Inventory, those items will end up on this report.

Call Number	Title	Author
677.3354	Capital markets for public issues:	
DT13B94	Zaid in education	Byham, William C.
677.6345	Regional trade in scheduling	Edwards, Nancy L.

To Resolve: Search for the item in Cataloging. Determine if the holding record that is lacking the barcode is a valid record that you need to keep or if it is just a duplicate “mistake” record that can be deleted. Your best guide is your shelves---- make sure you have a holding record for each copy of the item you have on your shelves. If all copies are accounted for, you can probably just delete this “extra” holding record. If not, you can add the necessary barcode to this holding record and save it.

The Duplicate Barcode Report will list any occurrences where two records in your database have the same barcode. It will be very rare for anything to show up on this report!

To Resolve: If you do have any duplicate barcodes, you will need to pull the records up in the Cataloging module and then compare the records with the items that are on your shelf to determine if one of the records needs to be changed to another barcode, or if one is just a pure duplicate record and can be deleted.

The Out of Range Report is only generated when conducting a Partial Inventory (see page 11).

The Statistics Report gives a brief synopsis of your Inventory—including number of barcodes scanned, number of records in your database and cost information surrounding missing items.

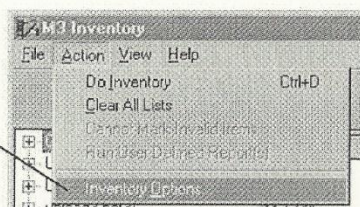
Note: To print any of your Inventory Reports, click on the tab for the report you want to print. Then click on the File Menu and choose "Print [report name] List."

Part 2: Conducting a Partial Inventory

M3 allows you to conduct a Partial Inventory on your collection; essentially, you can choose a section of your collection (i.e. Reference) to inventory without being concerned with the rest of your catalog.

The process for conducting a partial inventory is basically the same as that for conducting a full inventory. Follow the instructions given previously for scanning barcodes with your portable scanner and uploading them into your Inventory Module. Before processing your inventory, do the following:

In the Inventory Module, click on the Action Menu and choose “Inventory Options”

A screenshot of the 'Inventory Options' dialog box. It contains the following fields and controls:

- 'Institution Name' text box with the value 'Wayne-Finger Lakes BOCES School Library System'.
- 'Database Set' dropdown menu with 'Library' selected.
- 'Barcode Patterns' table with columns: Pattern, Min, Max, Leading, Trailing. The first row shows 'SLS', '4', '20', and empty cells for 'Leading' and 'Trailing'.
- Buttons: 'New Pattern', 'Modify Pattern', 'Delete Pattern'.
- 'Call Number Ranges' table with columns: Prefix, Classification, Classification. It is currently empty.
- Buttons: 'New Range', 'Modify Range', 'Delete Range'.
- Checkboxes: 'Barcodes are case-sensitive' (unchecked), 'Check call number sequence' (checked).
- 'Save' and 'Cancel' buttons at the bottom.

On the Inventory Options screen, **click on New Range** to specify the range of call numbers you want to inventory. When this range window is blank, it means that inventory will be conducted on your entire database.

In the New Range window, you can specify the call number range that you want to inventory. Notice that the box for the beginning of the range is “equal to or greater than”---whatever number you put in this box will be included in the inventory. The box for the ending of the range specifies call numbers “less than” only---the number you put in that box will not be included in the inventory; only those call numbers below it. *Note: Classification refers to entries in the 852h subfield of the Holding record.*

You may also need to have the Prefix box checked---if this box is not checked, Inventory will include all items that have the classification you’ve specified, even if they have a prefix. *Note: Prefix refers to entries in the 852k subfield of the Holding record.*

A screenshot of the 'New Range' dialog box. It contains the following fields and controls:

- 'Prefix' checkbox (unchecked).
- 'Call No. equal to or >' text box with the value '100' and a '.000' suffix.
- 'To Call No. <' text box with the value '200' and a '.000' suffix.
- 'OK' and 'Cancel' buttons at the bottom.

Call Number Range Examples

Example 1:

Inventory all non-fiction items with or without a prefix.

Includes classifications from 000 to 998.999. This will also include items with non-fiction numbers that also have a prefix, i.e REF, VID. To exclude items with prefixes from inventory, see Example 2.

The 'New Range' dialog box shows the 'Prefix' checkbox unchecked. The 'Call No. equal to or >' field is set to 000 and the 'To Call No. <' field is set to 999. Both fields have a '.000' suffix. The 'Classification Part' label is visible above the input fields. 'OK' and 'Cancel' buttons are at the bottom right.

The 'New Range' dialog box shows the 'Prefix' checkbox checked. The 'Call No. equal to or >' field is set to 000 and the 'To Call No. <' field is set to 999. Both fields have a '.000' suffix. The 'Classification Part' label is visible above the input fields. 'OK' and 'Cancel' buttons are at the bottom right.

Example 2:

Inventory all non-fiction items without a prefix.

Includes classifications from 000 to 998.999. Checking the prefix box and leaving the selection blank will exclude all items that have a prefix, i.e. REF, VID.

The 'New Range' dialog box shows the 'Prefix' checkbox checked and the text 'REF' entered in the adjacent field. The 'Call No. equal to or >' field is set to 000 and the 'To Call No. <' field is set to 999. Both fields have a '.000' suffix. The 'Classification Part' label is visible above the input fields. 'OK' and 'Cancel' buttons are at the bottom right.

Example 3:

Inventory all non-fiction items with a prefix of REF.

Includes classifications from 000 to 998.999 that also have REF in the prefix (852k).

The 'New Range' dialog box shows the 'Prefix' checkbox checked. The 'Call No. equal to or >' field is set to F and the 'To Call No. <' field is set to G. Both fields have a '.000' suffix. The 'Classification Part' label is visible above the input fields. 'OK' and 'Cancel' buttons are at the bottom right.

Example 4:

Inventory all fiction items that do not have a prefix.

This shows the use of an alphabetical range---F is less than G; Z is greater than A, etc. This inventory will include classifications that begin with F, i.e. F, FIC, FICTION.

When you create your call number range(s) for inventory, they will show in this window on the Inventory Options screen.

Note that you can create more than one range for an inventory. In this example, I have one range that includes all items that have a prefix of REF and a second for all items that have a prefix of R. Using multiple ranges like this can accommodate for inconsistencies you may have in your records---some reference items have a prefix of REF, some have R, etc.

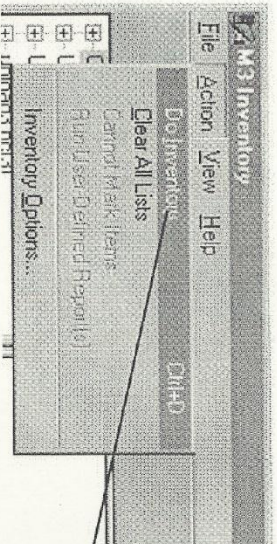
Click Save when finished.

The 'Inventory Options' dialog box shows the 'Institution Name' as 'Wayne-Finger Lakes BOCES School Library System' and the 'Database Set' as 'Library'. Under 'Barcode Patterns', there are buttons for 'New Pattern', 'Modify Pattern', and 'Delete Pattern'. The 'Cell Number Ranges' section contains a table with two rows: one for 'REF' with classification '000' to '999' and another for 'R' with classification '000' to '999'. Below the table are buttons for 'New Range', 'Modify Range', and 'Delete Range'. At the bottom, there are checkboxes for 'Barcodes are case-sensitive' and 'Check call number sequence', a 'Printed report font size' dropdown set to '10', and 'Save' and 'Cancel' buttons.

Prefix	Classification	Classification
REF	000	999
R	000	999

Processing a Partial Inventory

The processing step for a partial inventory is the same as for a full inventory:



When all barcodes have been uploaded into Inventory, you will need to run this Processing step so that M3 can compare the barcodes you've uploaded with those in your database. Once you process inventory, you will be able to view and print out a variety of reports. To process, *click on the Action menu and choose "Do Inventory."*

Reports for a Partial Inventory

Follow the instructions given beginning on page 80 of these instructions for looking at reports and marking items missing. When conducting inventory on a range of call numbers, all reports will give information only pertaining to that range (i.e. a list of missing items from that range of call numbers).

Out-of-Range Report

This report is only generated during a partial inventory. It will give a list of any barcodes scanned into inventory that are not in the specified range. For example, if you have set your call number range for non-fiction only and a fiction book has been scanned into inventory at some point, that fiction item will show on the Out-of-Range Report. This may indicate that the fiction item is incorrectly shelved in the non-fiction section.

To Resolve:

The report will show you what item was scanned before or after the item to help you locate it on the shelf, pull it and shelve it in the correct location.